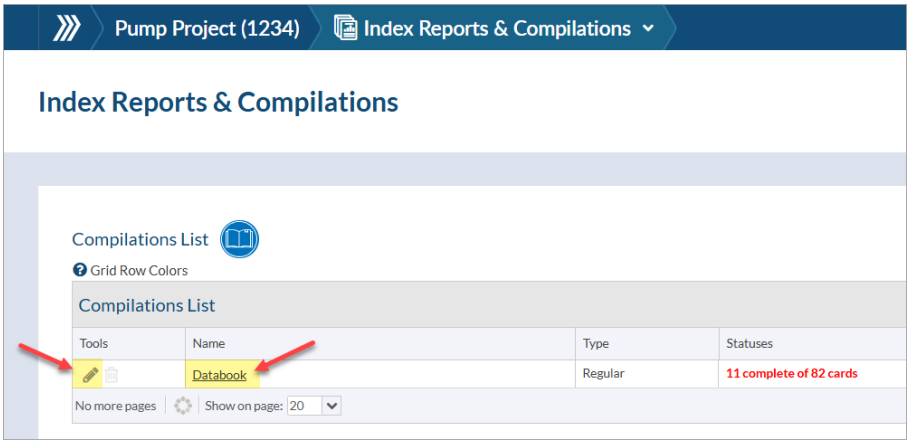
Overview of Compilation Options

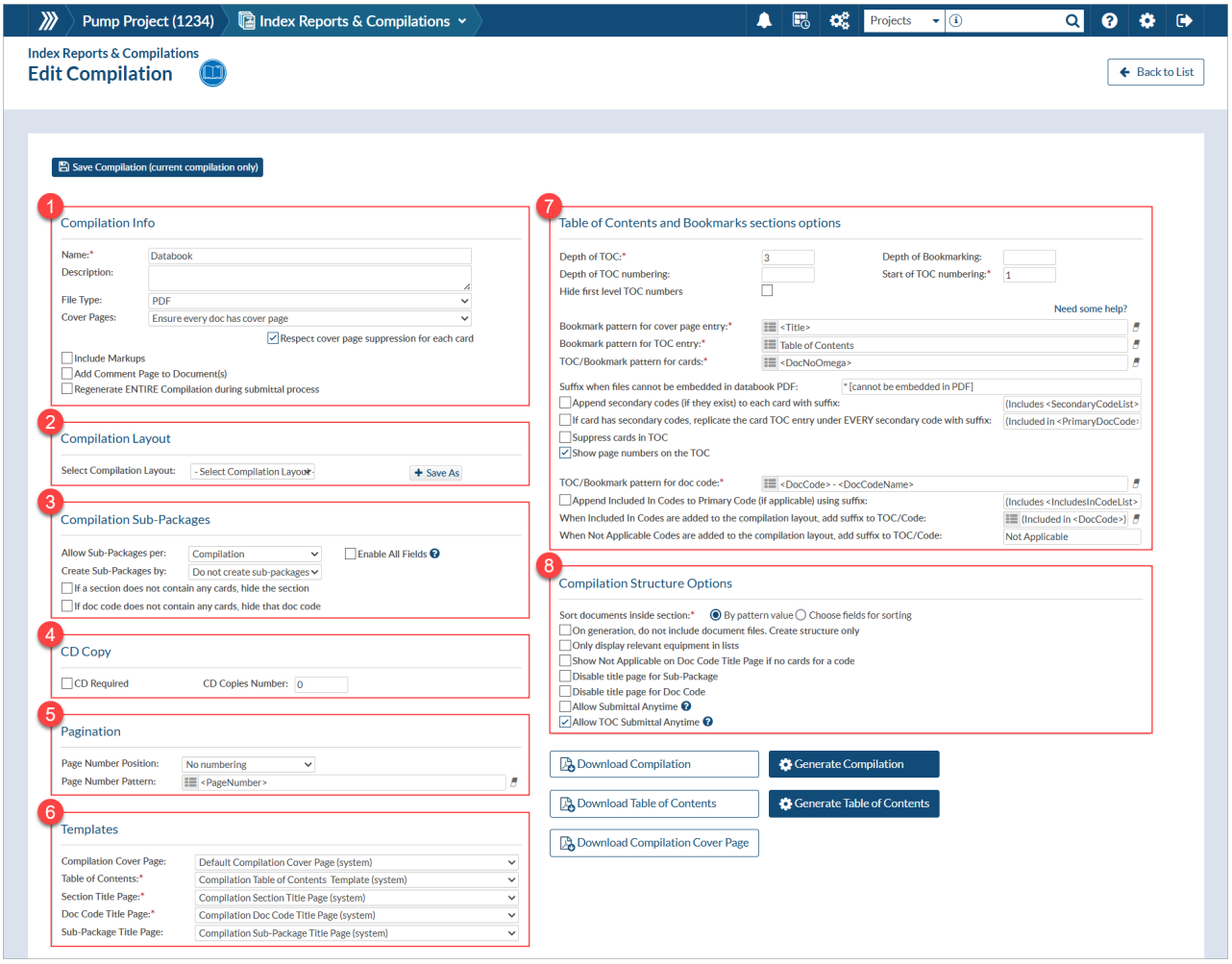
07/07/2026 11:56 am MDT

After creating a compilation (see article: Create a Compilation), the settings can be updated to reflect the requirements of your customer.

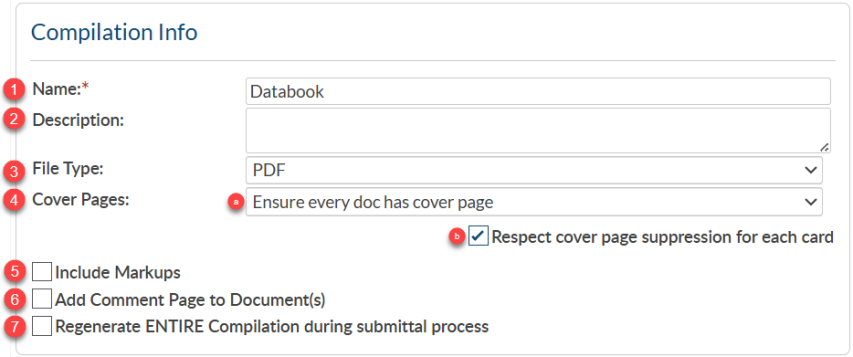
To edit a compilation, navigate to **Project Menu > Index Reports & Compilations.** Open the compilation editor by clicking on the name, or on the pencil icon in the "Tools" column.



There are eight sections available for adjustment:

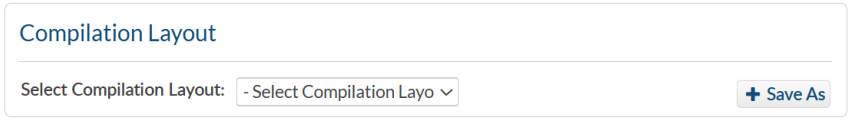


1. Compilation Info



1. **Name:** The name of the compilation.
2. **Description:** Additional information that has to be included about the compilation.
3. **File Type:** How the compilation downloads (as a .pdf file **or** a .zip with folders).
   Note: If the compilation is set to download as a .zip, cover pages will be merged into PDFs and generated as separate files alongside non-PDF files.
4. **Cover Pages:** If/how cover pages are included in the compilation
   a. Available options: "No Cover Pages", "Keep cover pages on returned docs only", or "Ensure every doc has cover page".
   b. "Respect cover page suppression for each card" option will prevent a cover pages from being added to cards where "No stamp and no cover page" has been selected.
5. **Include Markups:** Option to include or exclude markups should they be included in the documents.
6. **Add Comments Page to Document(s):** Option to include or exclude comments pages in the compilation.
7. **Regenerate ENTIRE Compilation during submittal process:** Option to regenerate the compilation at the point of submittal. If disabled, the Compilation will need to be manually regenerated to ensure the latest version is submitted.
   - For large projects, it is recommended that this option be disabled to avoid delays in the submittal process.

2. Compilation Layout

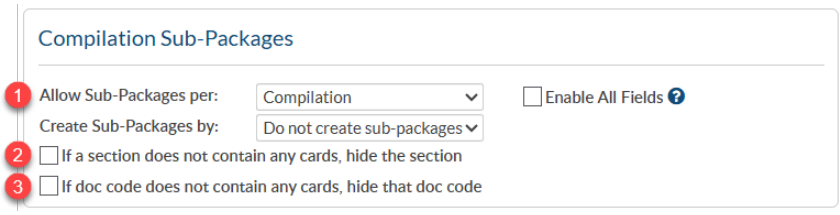


Option to select a predefined layout and/or save the current layouts for use on future compilations.

See the following articles for more information:

1. Compilation Structure and Styling Presets
2. Create Reusable Compilation Layout

3. Compilation Sub-Packages

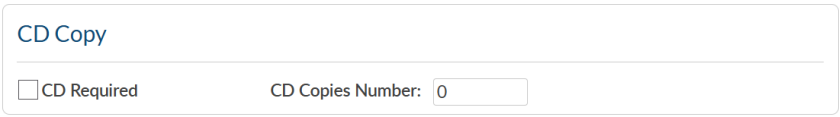


1. **Allow/Create Sub-Packages per:** Option to create sub-packages based on fields in the equipment list. For more information, see this article: Compilation Sub-Packages.

2. **If a section does not contain any cards, hide the section:** Option to hide sectionshat do not contain any cards.

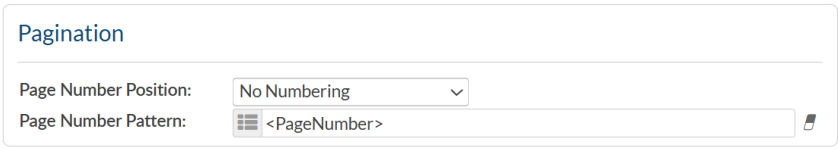
3. **If doc code does not contain any cards:** Option to hide doc codes that do not contain any cards. Automatically enabled if sections without cards are being hidden.

4. CD Copy



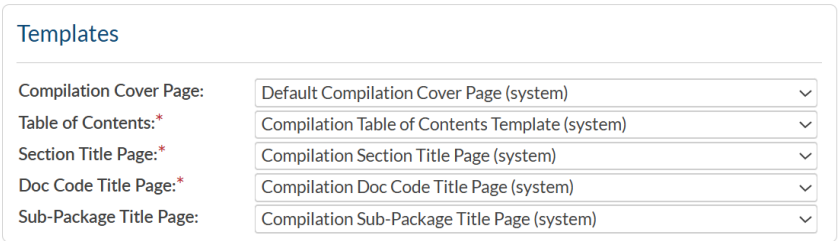
Options available are used strictly in the pricing module (a feature that helps you charge customers for document services). This option allows you to set whether a CD is required, and how many copies are to be generated. For more information, see this article: Prices and Estimates.

5. Pagination



Option to include or exclude page numbers, set the location for where the number appears, and set the pattern for how the numbering appears.

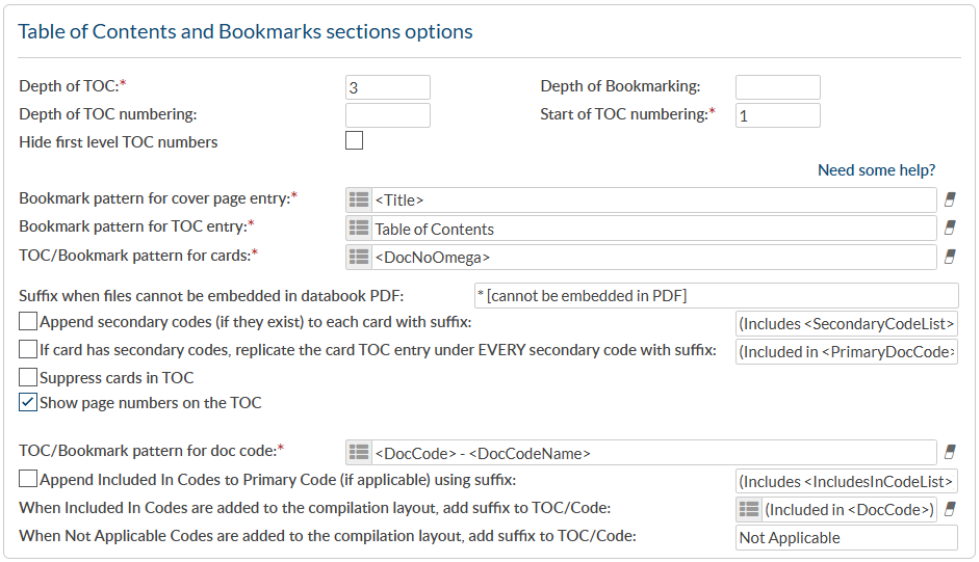
6. Templates



Option to select pre-established cover/title pages and/or table of contents templates for use in the corresponding section(s) of the compilation.

There are five different templates used in compilations. For more information, see this article: Compilation Templates (and Layout Impacts).

7. Table of Contents and Bookmarks sections options

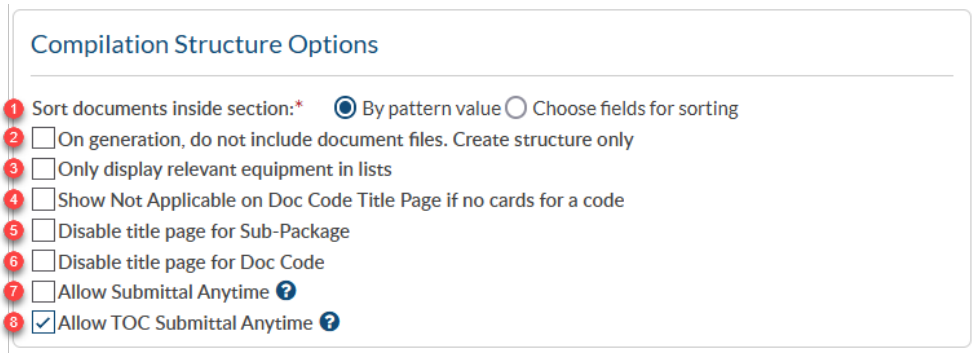


Options for configuring and sorting the cards in the compilation, among other settings.

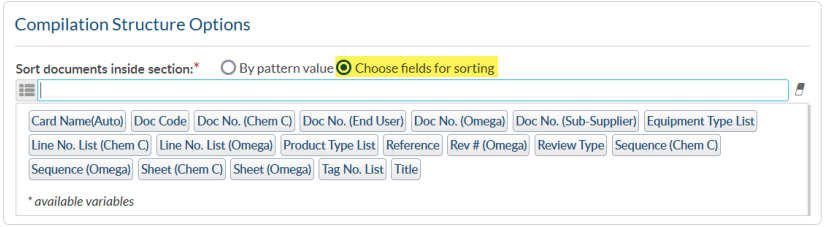
See the following articles for more information:

1. Overview of Table of Contents Options
2. Table of Contents - Examples
3. Sort Cards in Compilation

8. Compilation Structure Options



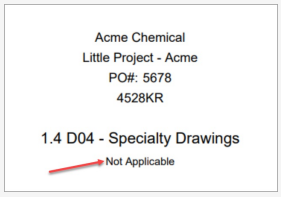
1. **Sort documents inside section:** Option to choose whether documents inside sections are sorted by pattern value (as defined in the "Table of Contents and Bookmarks sections options" section), or sorted as defined in this section:



2. **On generation, do not include document file. Create structure only:** Option to check if the compilation structure is correct without including the files, saving you time when generating the compilation.
3. **Only display relevant equipment in lists:** Option to exclude tags which are not included in the cards of the compilation.

> **Example:** Compilation level is set to "Order".
>
> By default, all units are included based on the level even if the included cards do not reflect all units. If this option is selected, the compilation will only include units which are reflected in the associated cards.

4. **Show Not Applicable on Doc Code Title Page if no cards for a code:** Option to include cover pages in the compilation even if no files attached.

> **Example**: Compilation level is set to "Shipment".
>
> Shipment 1 includes "D04 - Specialty Drawings", but Shipment 2 does not. To keep the compilations consistent, the code should still appear even if there are no cards included in Shipment. With this option selected, a cover page will be added but will indicate "Not Applicable" on it.
>
> 
>

5. **Disable title page for Sub-Package**: Option to include or exclude title pages for sub-packages.
6. **Disable title page for Doc Code:** Option to include or exclude title pages for doc codes (saving the need to manually disable for each code).
7. **Allow Submittal Anytime:** Option to allow or restrict submittal of the compilation before completion.
8. **Allow TOC Submittal Anytime:** Option to allow or restrict submittal of the Table of Contents before compilation completion.

> If you make any changes to the above selections, make sure to save by clicking the "Save Compilation (current compilation only)" button (top right of the page) **before** generating the Compilation.

Document Codes and Sections

For information about the Document Codes and Sections interface, see this article: Create a Compilation